T O U R I S M

VISITOR '87

A TRAVEL SURVEY OF VISITORS TO BRITISH COLUMBIA

NORTH BY NORTHWEST TOURISM REGION

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Industry, Science and Technology Canada
Industrie, Sciences et Technologie Canada

Province of British Columbia
Ministry of Regional Development

Province of British Columbia
Ministry of Tourism and Provincial Secretary

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BRITISH COLUMBIA TOURISM REGIONS
CASSIAR
FORT NELSON
H
Peace River, Alaska Highway
ALASKA
FORT ST JOHN
DAWSON CREEK
G
North by Northwest
PRINCE RUPERT
QUEEN CHARLOTTE CITY
PRINCE GEORGE
ALBERTA
QUESNEL
F
Cariboo
E
High Country
WILLIAMS LAKE
GOLDEN
100 MILE HOUSE
KAMLOOPS
SALMON ARM
RADIUM HOT SPRINGS
Vancouver Island
PORT HARDY
A
B
C
D
I
VERNON
Okan agan-Similk ameen
NELSON
Rocky Mountain
CAMPBELL RIVER
South-western B.C.
Kootenay Country
PORT ALBERNI
VANCOUVER
RICHMOND
PENTICTON
CRANBROOK
NANAIMO
VICTORIA
U.S.A.
A Vancouver Island
B Southwestern B.C.
C Okanagan-Similkameen
D Kootenay Country
E High Country
F Cariboo
G North by Northwest
H Peace River, Alaska Highway
I Rocky Mountain

INTRODUCTION

Visitors '87 is a survey of out-of-province visitors to British Columbia conducted during the period of July to October, 1987. It was undertaken to provide a measure of the numbers of people visiting the province during the summer and fall travel period, and to describe the characteristics and profiles of these visitors. It is the first province wide survey of tourists to British Columbia since 1979.

Visitors '87 involved the surveying of travellers arriving in B.C. at major highways, airports and marine terminals. The survey involved "screening" interviews with representatives of 13,743 travel parties entering B.C., or about 1% of total visitor traffic during the survey period. These parties were comprised of 2,940 excursionists (same-day travellers) and 10,803 tourists (one-or-more night travellers) or visitor parties.

Trip diaries were given to 3 out of 4 visitor parties and these travellers were asked to complete the diary on a daily basis and mail it to Survey Headquarters on the completion of their trip. Response rates of 40% were achieved resulting in 3,225 completed diaries representing over 20,000 party-nights spent in British Columbia. One out of four overnighting visitors were asked for their name and phone number, and a detailed follow-up interview was conducted by telephone (for North American visitors) and in airport departure lounges (for overseas visitors). A total of 1,005 of these interviews were completed.

The results of the personal interviews, telephone interviews and diary questionnaires were analysed and the results published in a provincial report entitled Visitors '87. To provide additional details at the regional level, nine separate reports were prepared - one for each tourist region - of which this is one.

HOW TO USE THIS REPORT

This report contains a summary of the most often asked questions about non-resident travel to the region. The tables have been set up to provide a variety of information in a concise, tabular format. In all cases, the formats are similar, with a breakdown of responses into three origin categories, a regional total, and a B.C. total.

The three origin categories of Canada, U.S.A. and International provide a comparison among the residents of these areas, which is intended to guide marketing programs. The regional figures and the B.C. figures allow convenient comparisons between the status of the region and the provincial average.

In all cases percentages have been reported. These percentages are intended to add vertically to 100% (in the case of non-multiple responses). In other words, the distribution of responses in each column can be compared to the percentages in the other columns. For example, the number of nights spent in the region by Canadians can be compared to the number of nights spent by Americans or by residents from offshore countries.

To keep the charts uncongested, the actual counts have not been tabulated. However, the counts (representing the number of parties) can be calculated using the figures provided in this report. The following chart tabulates the number of parties visiting each region from each of the three origin categories. Multiplying the appropriate figure from this chart by any percentage in the same origin category will provide a measure of the actual number of visitor parties.

The reader is cautioned that this chart can be used with all exhibits except those recording accommodation and activities. These are measured in party-nights and the appropriate total counts are tallied as Total Party-Nights (in hundreds).

FACTORS TO CALCULATE
ACTUAL NUMBERS OF TRAVEL PARTIES
FROM PERCENTAGES

(During July-October, 1987)

REGION	CANADA	USA	INT'L	REGION
Vancouver Island	106,000	330,000	48,000	484,000
S.W. B.C.	247,000	407,000	128,000	782,000
Okanagan	116,000	81,000	30,000	227,000
Kootenay Country	37,000	24,000	4,000	65,000
B.C. Rockies	145,000	122,000	23,000	290,000
High Country	111,000	127,000	45,000	283,000
Cariboo	7,000	40,000	10,000	55,000
North by Northwest	16,000	59,000	14,000	89,000
Peace River	9,000	35,000	4,000	48,000
B.C. Total	524,000	855,000	156,000	1,355,000

Visitors '87 has generated a vast amount of information about travel to British Columbia and travel within the region. To assist in the task of analysing the results on a regional basis, a series of the key results have been presented.

The following pages contain: a summary explanation of the regional results; a series of twelve tables describing various features about travel to the region; breakdowns of origins into categories of Canada, U.S.A. and International visitors; a comparison to 1979 results; and a summary of what visitors enjoyed most about the region.

In all the tables, the column percentage is quoted to the nearest whole number. The reader is advised to be cautious in interpreting an undue amount of precision in the numbers as statistical reliability varies for each entry in each table. Regional totals are considered accurate to within 3% to 5%, while individual elements in the exhibits have an error factor in the 5% to 20% range.

The reader is also cautioned to recognize the following points when using the report:

- The units of measurement represent number of parties, unless party-nights are specified;

- The survey was conducted solely of non-B.C. residents, as they entered the province between June 21 and October 31, 1987. This 4+ month period represents approximately 52% of total visitor traffic to B.C.;

- Travel by B.C. residents is not included in this survey. Domestic travel is estimated to represent about 45% of total B.C. tourism;

- Consequently, the survey represents between 25% and 30% of B.C. tourism.

For further information regarding the methodology and results of Visitors '87, please contact:

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HIGHLIGHTS

NON-RESIDENT TRAVEL IN THE NORTH BY NORTHWEST REGION

In 1987, there were about 302,000 party-nights spent by non B.C. residents to the North by Northwest tourist region during the period from late June to the end of October. The North by Northwest region represents approximately 4% of provincial visitor party-nights.

The total number of parties visiting B.C.'s North by Northwest during the four month survey period was 89,000. Americans made up the largest market share at 66% followed by Canadians at 18% and International visitors at 16%. The average length of stay was 3.4 nights.

Half of all visitors to the Northwest region travelled by private automobile. This was followed by R.V.'s at 32% and ferry travel at 23%. (The relatively high ferry figure represents the significance of the Port Hardy-Prince Rupert run.)

Touring was the main purpose of trip for seven out of ten (72%) visitors to the Northwest. This was followed by visiting friends and relatives (38%) and an outdoors trip (27%).

The average party size of visitors to the Northwest was 2.6, while the most common party composition was two adults travelling together.

The majority of visitors to the Northwest had been to B.C. before as seven out of ten indicated this was not their first trip.

Approximately three-quarters of visitors (74%) to the Northwest did not attend Expo 86.

Camping was the preferred accommodation for four out of ten visitors to the Northwest. One in four visitors preferred to stay with friends and relatives.

Sightseeing was the major activity pursued by 47% of travellers. This was followed closely by passing through (47%) and shopping (24%).

Visitors to B.C.'s Northwest spent an average of $134 per party and $52 per person per day. Cruise/package costs were the single largest daily expenditure at $30. The total non-resident tourist revenue generated in the North by Northwest region during the July through October period in 1987 was $36 million or 4% of the provincial total.

NUMBER OF NIGHTS SPENT IN NORTH BY N.W. TOURIST REGION

NIGHTS	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
1	-	-	-	-	11%
2	-	7%	-	5%	16
3	4%	17	-	12	19
4	7	8	5%	7	12
5-7	48	26	29	30	19
8-10	18	24	13	21	10
11-15	21	16	54	23	11
16-20	2	1	-	1	-
20 and over	-	1	-	1	-
Row Percentage	18%	66%	16%	100%	100%

- o The average length of stay by visitors to B.C.'s North was 3.4 days.
- o International visitors were likely to stay the longest compared to Canadians or Americans.
- o Two-thirds of total party nights were spent by Americans (66%).
- o Almost twice as many people stayed in the area for between a week and two weeks (74%) compared to the rest of the province (40%).

IS B.C. THE MAJOR DESTINATION OF VISITORS TO NORTH BY N.W.?

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	10%	68%	49%	54%	38%
Yes	90	32	51	47	62
Row Percentage	19%	65%	16%	100%	100%

- o B.C. was the major destination for just under one-half (47%) of all visitors to B.C.'s North by Northwest.
- o B.C. was most likely to be the main destination for Canadians (90%) and least likely to be the main destination for Americans (32%).

METHOD OF TRAVEL TO B.C.
OF VISITORS TO NORTH BY N.W.

MODE OF TRANSPORT	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Own Automobile	80%	50%	4%	48%	48%
Rented Automobile	-	3	9	3	8
R.V.	15	40	4	30	14
Bus	-	1	19	4	3
Plane	16	8	88	23	30
Train	-	1	9	2	1
Cruise	-	1	-	1	4
Ferry	-	23	-	15	11
Other	-	3	-	2	1
Row Percentage	18%	66%	16%	100%	100%

- The most popular mode of transportation to B.C. for visitors to the North by N.W. region was private car (48%) followed by R.V. (30%) and then plane (23%).
- International visitors were most likely to arrive by plane (88%) than Canadians (16%) or Americans (8%).
- Canadians were most likely to arrive by private car (80%) than Americans (50%) or International visitors (4%).
- International visitors were far more likely to arrive by bus or train than Americans or Canadians.

METHOD OF TRAVEL IN B.C.
OF VISITORS IN NORTH BY N.W.

MODE OF TRANSPORT	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Own Automobile	76%	51%	14%	50%	50%
Rented Automobile	13	10	33	14	20
R.V.	14	39	26	32	15
Bus	-	4	12	4	11
Plane	12	3	3	5	3
Train	-	2	19	5	3
Cruise	8	2	5	4	3
Ferry	24	18	43	23	17
Other	3	7	16	7	13
Row Percentage	21%	62%	17%	100%	133%

- Close to half of all visitors (50%) to Northwest B.C. travelled by private car.

- Rental vehicles were particularly popular among International visitors at 33%.

- Ferry travel was popular among all visitors ranging from 43% for International visitors to 24% for Canadians and 18% for Americans.

- Close to one in five International visitors travelled by train (19%) compared to only 2% of Americans and no Canadians.

MAIN PURPOSE(S) OF TRIP OF VISITORS TO NORTH BY N.W.

MAIN PURPOSE PURPOSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Business	9%	2%	-	3%	10%
Conference	-	6	-	4	5
Visit Friends/ Relatives	77	27	42	38	38
Touring Trip	43	76	88	72	56
City Trip	8	4	5	5	11
Personal	9	5	9	6	6
Outdoors Trip	2	38	11	27	20
Wilderness/Adventure	4	19	42	20	10
Resort	-	1	8	2	14
Cruise	15	18	-	14	7
Theme Park	-	8	9	6	6
Special Event	8	1	-	2	5
Row Percentage	19%	65%	16%	100%	187%

- Approximately 7 out of 10 visitors (72%) cited touring as the main purpose of their trip. This was followed by visiting friends and relatives (38%) and taking an outdoors trip (27%).

- Touring was particularly important to International visitors and Americans - cited by approximately 9 out of 10 people.

- Canadians were the most likely to be visiting friends and relatives (77%) compared to 42% of International visitors and 27% of Americans.

- The percentage of people participating in a wilderness/adventure or outdoors trip in B.C.'s Northwest was significantly higher than the rest of the province.

- The number of people visiting the Northwest as part of a cruise was quite high among Canadians (15%) and Americans (18%).

PARTY COMPOSITION OF VISITORS TO NORTH BY N.W.

PARTY COMPOSITION	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
1 Adult	22%	12%	28%	17%	14%
2 Adults	54	55	31	50	52
3 Adults	-	7	-	5	5
4 or More Adults	-	8	38	12	10
Adult(s) and 1-2 Ch.	14	18	3	15	15
Adult(s) and 3+ Ch.	11	-	-	2	3
Row Percentage	18%	65%	17%	100%	100%
Average (persons)	2.3	2.5	3.3	2.6	2.64

- o Half of all parties visiting Northwest B.C. (50%) were comprised of two adults.
- o A comparatively small percentage of visitors (17%) were travelling with children.
- o International visitors were more likely to travel in larger groups with an average of 3.3 persons compared to a regional average of 2.6 persons.

FIRST VISIT TO B.C. BY VISITORS TO NORTH BY N.W.

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	92%	75%	26%	70%	73%
Yes	8	25	74	30	27
Row Percentage	19%	65%	16%	100%	100%

- o Just under one-third of visitors (30%) to Northwest B.C. were making their first trip to the province.
- o First time visits were the least common among Canadians (8%) and the most common among International visitors (74%).
- o Three-quarters of American visitors (74%) have been to B.C. before.

NUMBER OF TRIPS TO B.C. IN THE PAST THREE YEARS BY VISITORS TO NORTH BY N.W.

NO. OF TRIPS	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
None	22%	32%	43%	30%	19%
1	4	20	15	16	15
2	9	31	42	27	21
3	29	11	-	14	15
4-5	19	6	-	8	11
6 or more	17	1	-	5	19
Row Percentage	24%	68%	8%	100%	100%
Average (trips)	4.5	1.5	1.0	2.1	3.71

- Travellers to Northwest B.C. had made an average of 2.1 trips to the province over the last three years. Canadians were the most frequent travellers averaging 4.5 trips over the last three years.
- Approximately 3 out of 10 visitors (30%) were making their first trip to B.C., while 5% claim to have visited the province six or more times in the last three years.

VISITED EXPO 86 BY VISITORS TO NORTH BY N.W.

RESPONSE	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
No	44%	82%	84%	74%	68%
Yes	56	19	16	26	32
Row Percentage	22%	67%	12%	100%	100%

- Approximately three-quarters (74%) of visitors to Northwest B.C. did not visit Expo 86.
- Canadians were most likely to have attended Expo (56%) compared to Americans (19%) or International visitors (16%).

ACCOMMODATION USED BY VISITORS TO NORTH BY N.W.

ACCOMMODATION	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Hotel	5%	5%	13%	6%	16%
Motel	33	23	24	26	24
Campground	13	52	38	40	24
Friends/Relatives	41	13	25	21	26
Resort/Lodge	9	4	1	5	4
Cottage/B & B	-	-	-	-	2
Other	-	3	-	2	4
Row Percentage	25%	60%	15%	100%	100%
Total Party Nights	54,000	131,000	32,500	217,400	5,711,900

- The most used accommodation by visitors to Northwest B.C. was campgrounds (40%) followed by motels (26%) and the homes of friends and relatives (21%).
- Americans were the most likely to stay in campgrounds at 52% compared to International visitors at 38% and Canadians at only 13%.
- Canadians were most likely to stay with friends or relatives (41%).
- The percentage of people visiting the Northwest and staying in campgrounds was much higher than the provincial average, while the percentage of people staying in hotels was much lower.

ACTIVITIES PURSUED BY VISITORS TO NORTH BY N.W.

ACTIVITIES	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Shopping	23%	23%	28%	24%	37%
Tour	3	9	24	10	11
Sightseeing	31	56	43	47	50
Passing Through	27	55	51	47	21
Business	7	1	-	3	8
Outdoor Activities	27	19	9	20	28
Sporting Activities	17	11	2	11	11
Nightlife	7	2	-	3	9
Other Activities	3	2	6	3	4
Beach/Lakeshore	16	16	14	16	27
Museum/Gallery	9	12	4	10	11
Historic Site	6	17	13	14	14
Amusement Park/Fair	-	3	4	2	4
Gardens/Parks	9	11	20	12	25
Friends/Relatives	40	5	18	16	26
Other	5	2	-	2	3
Sporting Event	2	-	1	1	2
Festival	2	-	1	1	3
Cultural Performance	2	3	2	3	3
Other Event	4	-	-	1	1
Row Percentage	26%	58%	16%	100%	298%
Total Party Nights x (100)	548	1239	333	2121	56715

- The most popular activities for people visiting the Northwest were sightseeing (47%), passing through (47%) and shopping (24%).
- Visiting friends and relatives was cited as the main activity for 40% of Canadians.
- Canadians were much more likely to have participated in outdoor or sporting activities (44%) than Americans (30%) or International visitors (11%).
- Less important activities include business, visiting amusement parks/fairs and attending sporting events, cultural performances or festivals.

AVERAGE EXPENDITURES BY VISITORS TO NORTH BY N.W.

(PER PARTY PER DAY)

CATEGORY	CANADA	U.S.A.	INT'L	REGIONAL TOTAL	B.C. TOTAL
Accommodation	$20.66	$26.53	$29.34	$25.51	$37.28
Auto Transportation	22.79	24.53	46.77	26.93	15.19
Other Transportation	1.14	11.34	36.76	12.43	6.48
Package/Cruise	58.18	21.01	17.75	29.69	10.19
Restaurants	19.00	16.69	31.93	19.21	26.75
Groceries	7.06	11.01	7.78	9.61	7.89
Recreation/ Entertainment	.95	1.52	.99	1.31	5.26
Shopping/Souvenirs	14.21	6.14	12.76	8.97	18.98
Other	1.99	2.47	10.73	3.42	4.87
Total Expenditure per party per day	$142.14	$119.05	$190.68	$133.97	$131.88
Party Size	2.3	2.5	3.3	2.6	2.64
Total Expenditure per party per day	$61.80	$47.62	$57.78	$51.53	$49.95

- The average expenditure by visitors to Northwest B.C. was $134 per party, while the average expenditure per person per day was $52. The former figure was very close to the provincial average.
- International visitors tended to spend the most both per party - $191 - and Canadians the most per person.
- Cruise/package costs were cited as the single largest expenditure ($30) followed by auto transportation ($27) and then accommodation ($26).

"BEST" ASPECTS OF EACH REGION

RESPONSE	SOUTHWEST B.C.	VANCOUVER ISLAND	OKANAGAN SMILKAMEEN	KOOTENAY COUNTRY	B.C. ROCKIES	HIGH COUNTRY	CARIBOO	NORTH BY N.W.	PEACE RIVER-ALASKA	B.C. TOTAL
Scenery	49%	51%	38%	65%	51%	52%	58%	54%	49%	46%
Mountains	9	6	7	6	16	7	-	15	6	9
Lakes	13	15	19	14	14	14	11	5	8	13
Gardens	9	10	3	2	1	9	-	15	6	5
Fruits	5	6	14	7	-	3	-	-	-	4
Parks	5	8	3	6	11	4	-	4	-	4
Clean	1	1	5	-	2	1	-	10	1	3
Weather	21	28	49	38	30	19	4	7	20	24
Family	13	7	25	43	8	10	4	5	14	15
Friendly	21	23	17	9	24	21	20	33	26	20
Recreation	9	10	22	5	21	5	25	2	12	13
Food	9	9	9	7	7	7	11	16	6	9
Accommodation	9	4	6	9	7	9	-	21	8	8
Shopping	2	3	-	1	5	1	-	21	-	3
Campgrounds	4	4	8	-	15	7	15	4	12	9
Wilderness	3	4	-	-	7	6	11	-	6	4
Outdoors	11	12	5	19	26	9	15	16	-	10
Relaxing	9	8	6	6	5	6	10	3	11	6
Gen. Pretty	12	7	7	6	4	5	8	21	9	6
Gen. Touring	4%	2%	9%	-	4%	2%	11%	9%	-	4%

- Mentioned most often as the "best" aspects of North by Northwest were the scenery (54%), friendly people (33%), accommodation (21%) and shopping (21%) and generally pretty (21%).

- The "best" aspects of British Columbia were quite different with scenery at 46%, weather (24%) and friendliness (20%).

- Ranking lower in the opinions of visitors to North by Northwest than the overall perception of the province were lakes, weather, family, recreation, campgrounds and relaxing.

INTEREST IN VISITING REGIONS BY SEASON

REGION	SEASON			
	SPRING	SUMMER	FALL	WINTER
Southwestern B.C.	34%	68%	36%	22%
Vancouver Island	39	67	35	23
Okanagan Smilkameen	24	82	25	19
Kootenay Country	12	85	3	24
B.C. Rockies	28	83	16	24
High Country	30	79	23	16
Cariboo	12	100	50	18
North by N.W.	15	74	35	9
Peace River-Alaska	55	73	39	23
Total	34%	74%	33%	20%

- North by Northwest was perceived as an appropriate location to visit in the fall by 35% of summer visitors.
- Three-quarters of existing visitors would be interested in visiting in the summer and only 15% in the fall.
- Winter was seen as a season to visit North by Northwest by 9% of summer visitors.

COMPARISON OF VISITORS TO NORTH BY N.W. BETWEEN 1979 AND 1987

ORIGIN	1979		1987	
	NORTH BY N.W.	B.C.	NORTH BY N.W.	B.C.
Alberta	36%	33%	10%	19%
Saskatchewan	7	5	2	3
Manitoba	3	2	3	2
Ontario	7	6	3	7
Quebec	2	1	1	2
Other Canada	2	1	-	1
Total Canada	57	48	19	34
Washington	7	18	7	14
Oregon	3	5	8	6
California	9	11	14	13
Other West. U.S.	6	6	21	12
Other U.S.	11	7	16	12
Total U.S.	36	47	66	57
Europe	7	4	15	7
Asia	-	1	1	1
Australia/N.Z.	-	1	1	2
Other World	-	-	-	1
Total International	7%	6%	17%	11%

- o There has been a major shift in the relevant significance of the origin groups as Canada has dropped dramatically, while the U.S. and International origins have increased equally as dramatically.

- o Within Canada, Alberta has suffered the greatest decline from 36% in 1979 to 10% in 1987.

- o The U.S. registered increases from nearly all regions with the greatest improvements noted from California and Oregon and the other western states.